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Tobacco and Products

Annual

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Report Highlights:

Tobacco production in 2003 was 117,700 MT dry weight basis, and is expected to decline to 115,500 MT in 2004. Tobacco exports of unmanufactured leaf totaled 70,923 tons in 2003 and are forecast to increase to 85,000 in the current year. Tobacco production is traditionally an important sector of Greek agricultural production, and cigarette manufacturing is a significant source of employment. The tobacco sector employs 6.1 percent of the total labor force in Greece. CAP reform agreed in April 2004 will change production, under a phased implementation, with significant changes not expected until 2010.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

SECTION I. SITUATION & OUTLOOK

Production

Total 2003 Greek tobacco leaf production is presently estimated at 117,700 MT dry weight basis (dwb), which is subject to further revision after farmers' deliveries to the trade are complete. This is slightly higher than 2002 production level of 116,000 MT (dwb) and just below the EU guaranteed threshold Greek production quota, which was set at 117,869 MT for 2003 and 2004. Sources within the Ministry of Agriculture and Tobacco Industry report that 2004 tobacco production is predicted to be 115,500 MT (dwb), lower than the EU guaranteed threshold. Reportedly, plenty of rain late in spring, which continued through this summer may affect output of tobacco and cause some diseases.

Tobacco is produced under a quota system, which limits total output for individual varieties. The total EU quota for all varieties grown in in the EURO-15 for the crops 2003 and 2004 was set by the Commission at 327,296 MT, down from 337,973 MT in 2002. Greek production represents 36%, or 117,869 MT, of the total EU-15 output in 2003.

The majority of Greek tobacco production, oriental variety, accounted for 67,000 MT (dwb) in 2003. Since the 1990s, the production of oriental tobacco has trended downward due to a reduction in premium levels for certain unmarketable oriental varieties. Today, tobacco farmers are shifting cultivation towards the production of flue-cured tobacco, which is always within the EU production quota established for Greece.

Tobacco cultivation in Greece is very important, both socially and economically. Almost half of all EU tobacco growers are in Greece. The tobacco sector as a whole employs 6.1 percent of the total labor force in Greece. In 2002, there were an estimated 54,000 people employed as tobacco growers in Greece, generating a total gross income of €541.2 million. Another 150,000 people are employed on a seasonal basis bringing the total Greek workforce to 204,000 people. This represents 12 percent of the total Greek agricultural population, which is estimated at 1,700,000 people, the highest in the EU-15. Another 18,000 Greeks are employed in the processing and cigarette manufacturing sectors.

According to the National Statistical Service, the number of Greek Tobacco growers has decreased 13 percent since the year 1990. In addition to this phenomenon, tobacco farmers are aging, with youngsters not willing to work in Tobacco farming because it is highly labor intensive.

Policy

Currently, EU tobacco policy mandates production quotas, or guaranteed thresholds, which specify the volume and types of tobacco that receive EU subsidy payments. There are several EU regulations which cover different aspects of this tobacco regime.

For the period 2002-2004, EU basic Regulation 2848/1998 set the purchase delivery period while Regulation 546/2002 set the guaranteed thresholds volumes and the premiums per group of fixed varieties. In addition, Regulation 546/2002, also provide the fixed and the variable portion of the premium, after the deduction of the amounts withheld for the Tobacco Fund (-3% for 2003 crop) and the Specific Aid (-2%) granted to the Group of Tobacco growers. The actual total premium paid to farmers is the sum of the fixed and the variable premium, differing by variety grown.

Although quotas are mandated, they may be transferred among producers of different types of tobacco leaf and between producers in eligible Member States. For the 2002 tobacco crop, guaranteed threshold cited below were initially set by the same initial Regulation and confirmed after the quota transfers set by Regulation 1193/2002. The 2003 and 2004 crop guaranteed thresholds were initially set by the EU Regulation 546/2002 and confirmed after the quota transfers set by Regulation 640/2003 and Regulation 888/2003. EU Regulation 1501/8.22.2002 which amended article No.35 of Regulation 2848/1998, shortens in half the eligibility period for purchase from four months (September 1 - December 31) to two months (November 1 - December 31).

As stated above, Member States may publicly announce producers' intentions to sell their EU tobacco quotas and make them available for other producers to purchase them. At the end of the two-month eligibility period, any quotas, which have not been purchased by other producers, shall be permanently returned to the Community. For the 2003 crop, and after the quota transfers from one group of varieties to another, set by the above mentioned Regulations, 1,004 MT of the oriental Tsebelia & Mavra varieties were deducted from the guarantee threshold and returned to the EU.

The guarantee thresholds for the 2003-2004 Greek tobacco crops, after the quota transfers were declared, were 43,564 MT for Flue-cured (Virginia type), 10,290 MT for Burley and 64,015 MT for Oriental varieties. These are a reduction from quotas for the year 2002 Greek tobacco crop were set at: Burley 12,117 MT, Flue Cured (Virginia type) 40,603 MT and Oriental 68,233 MT. It should be noted that the above-mentioned EU regulations could also include transfers from Italy, Germany, France and Spain. However, there are no quota transfers reported between Greece and other EU member states.

There are minimal changes expected for the EU tobacco threshold levels and premiums until the implementation of the new CAP for tobacco, which begins with the 2006 Tobacco crop.

The prices received by Greek tobacco farmers include the market price plus the subsidy (premiums) given in the framework of EU's Common Market Organization policies implemented since accession. Since the subsidy is much higher than the market price, EU tobacco can be made competitive with tobacco produced in non-EU countries. According to the Greek Ministry of Agriculture, 70 percent of the Tobacco farmer's income in Greece is covered from an EU inflow of FEOGA funds (supports and subsidies) which for the year 2002 is estimated at € 512 million. Since 1993, Greek tobacco farmers have received a total of € 5.5 billion from the EU, in the form of premiums, refunds, stockpiling and specificities, which were special supports to tobacco farmers willing to abandon non marketable varieties between 1993 and 1998.

Over the recent years, EU policies have reduced premiums to farmers and shifted away from premiums for oriental types and other varieties not easily marketable. At the same time, EU Regulations pertaining to production quota levels and premiums were amended with the aim to redirect crop outputs from year to year. These relevant regulations have heavily supported those varieties that are mostly commercialized in the domestic and international markets. Flue cured, Basma and Katerini oriental types receive higher premiums annually while burley variety acreage and output remaining stable.

In the case of full abolishment of subsidies, even gradually, tobacco growers will be forced to convert to alternative crops or abandon agriculture due to soil conditions in most of the tobacco producing regions in Greece. Tobacco is a monoculture with a lack of alternative prospects. This reduction (and eventual abolition) of EU subsidy payments makes it imperative for the GOG to develop a realistic and integrated support program. It is evident for Greece that any negative developments in the tobacco sector will be mostly felt in less

developed areas, where growing and curing sustain and create new jobs. A shrinking of the sector will make the local economies more problematic. Eastern Macedonia and Thrace are the most vulnerable regions.

CAP Reform and Tobacco

On April 22 2004, the EU Council of Ministers decided to profoundly reform the Common Agricultural Policy (CAP) support for the Mediterranean products (tobacco, olive oil and table olives, cotton and hops.) These reforms are intended to lead to enhanced competitiveness, stronger market-orientation, improved environmental awareness and respect, less trade distortions and stabilized incomes for farmers. For the four sectors concerned, a significant part of the current production-linked payments will be transferred to the de-coupled single payment. For tobacco, before full de-coupling, the government of Greece (GOG) may decide to maintain coupled elements over a transition period of four years. In addition, portion of the current tobacco premiums will be used to finance restructuring programs in affected regions from 2010. For more information on the Tobacco CAP Reform in Greece see report GR4016.

Trade

The National Statistical Service and the Hellenic Association of Tobacco Processing Industries compiled the official Greek tobacco trade data for CY 2002 and 2003 presented in Trade Matrices at the end of this report. It is estimated that the value of Greek leaf tobacco exports in 2003 reached € 242.4 million, compared to € 245.6 million in 2002 and to € 253.6 million in 2001. Imports in 2003 were at approximately € 78.0 million, compared to €105.9 million in 2002. The Greek cigarette industry uses imported tobacco mostly for the production of special blends.

Exports of Greek tobacco fluctuate between 80-85,000 MT per annum in a normal year when quality is good. The calendar year 2003, there was a drop of exports by almost 12 percent from normal average sales, due to lower quality produced and an increased demand from domestic cigarette manufactures. Based on recent information from the field, 2004 tobacco crop develops well and if normal weather conditions prevail during harvest so without plant infections, a good quality product will be available this year. So, 2004 exports are expected to rebound to more normal levels.

Exported Greek tobacco products represent a 4.9 percent of the total value of Greek exports. The tobacco exports of Greece to third countries represent the 0.23% of GDP, almost 100 times higher than the corresponding percentage of other EU countries, while tobacco related employment in Greece represents approximately 1/5 of the corresponding figure for the whole of the EU-15.

From the point of view of volume, the most important buyers of Greek tobacco, which absorb about 80-85% of the total Greek exports are, Russia, Georgia, USA, Algeria, Germany, Egypt, EU-15 Countries, Serbia & Monte Negro, S. Korea, Japan, Indonesia, Uruguay, Hungary, Taiwan, Paraguay, Mexico, Israel, and Czech Republic. From the point of view of value, Russia comes in the first place, followed by USA, Germany, Indonesia, Egypt, Belgium, S. Korea, Algeria, France, Italy, Japan, the Netherlands, Serbia & MonteNegro, Switzerland, Austria, Portugal, Israel, Hungary and Taiwan. The foreign exchange inflow from these countries amount to about 85% of the total inflow. A weighted average of export prices for Greek leaf tobacco is reported to be at € 2.91/kg in 2003, compared to € 2.92/kg in 2002 and to € 3.00/kg in 2001.

Although Greece only imports around 300 tons of leaf tobacco directly from the United States, several thousands tons of U.S. origin leaves are transshipped from other EU Member States, like the Netherlands, for processing in Greece. Therefore, the data in the PSD table better reflects U.S. market share than the import matrix table that accounts only for direct imports.

Consumption

Consumption of leaf tobacco shows an upward trend during 2004, due to higher demand by manufacturers to cover an increase of cigarette demand. Plenty of visitors are expected in Greece due to Olympics, while tourist arrivals (excluding Olympic game visitors) are expected to reach 13 million by the end of the current year (usually between 12-12.5 million/year in the past 2-3 years). Also, manufacturers keep some processed leaf of good quality (from 2002 and 2003 crops, plus imports) to be processed later in the year. A slightly smaller crop is expected to be harvested in 2004 and its quality is estimated to be inferior compared to those in 2002 and 2003.

Stocks

Stocks cited in PSDs include more than one crop, in the hands of farmers, merchants and cigarette manufacturers. Ending stocks built up in 2003 due to fewer amounts exported, but are expected to decline in 2004 as consumption increases and exports are expected to recover to normal levels.

Cigarettes

Greek cigarette production and trade has not changed much over the past several years, although a slight increase in production, consumption & changes in exports have been observed. Exports fluctuate according to local demand (priority is given to the domestic demand and secondly to exports). About 58% of cigarettes consumed are locally produced (Greek Brands, plus foreign blended produced in Greece) and 42% are imported (see also table below which shows the composition of locally consumed cigarettes by type). For the years 1996-2001, average market share of imported cigarettes was stabilized at approximately 36%. In 2002 and 2003, this market share increased significantly, over the average of the period 1996-2001. One of the reasons for this is thought to be the cancellation of some under-license production agreements.

The market share of all blended brands produced locally decreased to 42% in 2002 with a slight further decrease in 2003. The market share for the traditional Greek brands remained stable at 16% in 2003 (certain traditional unmixed types, consumed in Greece) as well as that of the Greek blended brands, at 17% (blended only with Greek tobacco).

Five local companies carry out domestic cigarette production. In 2003, this output amounted to 36,415 million pieces of all types, of which 50.5% were taxed and consumed in Greece, while the remaining 49.5% was exported. Greece receives 7 percent of total taxation, solely from domestically consumed tobacco products.

Greek cigarette manufacturers developed their export sector in the 1990s. During the period 1985-1989 Greek cigarette exports amounted to 1.8 billion pieces on average annually, whereas the last seven years (1997-2003), they rose to an average of 15 billion pieces per year. Greek brands belong to a middle price category. If Greek cigarette manufacturers are forced to import most of their tobacco from abroad, the cost will rise significantly and Greek brands will move to a higher price category, thus losing their competitive advantage over foreign brands.

The Greek cigarette manufacturers, in order to cover their needs in raw material, buy their leaf tobacco from both the domestic as well as from international markets. Total processed tobacco imports (all types of products, including cigarettes) are estimated at approximately 20,000 MT per annum (gross weight basis) by the Association of Tobacco Manufacturers. This represents a rough estimate of all the imported leaf Tobacco forms and types yearly utilized by local manufacturers (leaf, blended, shredded mixtures-filler, and other), which expressed in MT dry weight basis in the attached PSD. This industry estimate also includes all other imported products including Cigars, Cigarillos, pipe tobaccos, and cigarettes expressed in gross weight basis.

MARKET SHARES IN GREEK CIGARETTE CONSUMPTION

CATEGORY	INDICATIVE YEAR: 2002
(1) GREEK UNMIXED	16%
(2) GREEK BLENDED	17%
(3) GREEK BRANDS TOTAL (3)=(1)+(2)	33%
(4) FOREIGN BLENDED PRODUCED IN GREECE	25%
(5) BLENDED PRODUCED IN GREECE (5)=(2)+(4)	42%
(6) CIGARETTES PRODUCED IN GREECE, TOTAL (6)=(3)+(4)	58%
(7) IMPORTS	42%
(8) FOREIGN BRANDS TOTAL (8)=(4)+(7)	67%
CIGARETTE CONSUMPTION (6)+(7)	100%

PS&D Table, Tobacco, Unmfg., Total

PSD Table

Country	Greece						UOM
	Tobacco, Unmfg., Total (HA)(MT)						
Commodity	2002	Revised	2003	Estimate	2004	Forecast	
	USDA Official	Estimate [DA]	Official [DA]	Estimate [DA]	Official [DA]	Estimate [New]	
Market Year Begin	01/2002		01/2003		01/2004		MM/YYYY
Area Planted	57000	56956	57000	54329	0	55350	(HA)
Beginning Stocks	29998	29998	30998	36374	27498	52213	(MT)
Farm Sales Weight Prod	123000	118500	124000	121000	0	119100	(MT)
Dry Weight Production	120000	116000	121000	117700	0	115500	(MT)
U.S. Leaf Imports	3000	4000	2500	2400	0	2100	(MT)
Other Foreign Imports	14000	19986	13000	16262	0	15450	(MT)
TOTAL Imports	17000	23986	15500	18662	0	17550	(MT)
TOTAL SUPPLY	166998	169984	167498	172736	27498	185263	(MT)
Exports	90000	84124	98000	70923	0	85000	(MT)
Dom. Leaf Consumption	36000	40986	37000	43600	0	46300	(MT)
U.S. Leaf Dom. Consum.	4000	4100	2000	2050	0	1850	(MT)
Other Foreign Consump.	6000	4400	3000	3950	0	5300	(MT)
TOTAL Dom. Consumpti	46000	49486	42000	49600	0	53450	(MT)
TOTAL Disappearance	136000	133610	140000	120523	0	138450	(MT)
Ending Stocks	30998	36374	27498	52213	0	46813	(MT)
TOTAL DISTRIBUTION	166998	169984	167498	172736	0	185263	(MT)

PS&D Table, Tobacco, Unmfg., Flue Cured

PSD Table**Country****Greece****Commodity****Tobacco,Unmfg.,Flue Cured (HA)(MT)**

Market Year Begin	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [	Estimate [D]	DA Official [	Estimate [D]	DA Official [	Estimate [New]	
	01/2002		01/2003		01/2004		MM/YYYY
Area Planted	0	12000	0	12379	0	17484	(HA)
Beginning Stocks	0	13559	0	14784	0	23734	(MT)
Farm Sales Weight Prod	0	35781	0	40000	0	40500	(MT)
Dry Weight Production	0	35000	0	38500	0	39000	(MT)
U.S. Leaf Imports	0	2800	0	1600	0	1300	(MT)
Other Foreign Imports	0	350	0	200	0	150	(MT)
TOTAL Imports	0	3150	0	1800	0	1450	(MT)
TOTAL SUPPLY	0	51709	0	55084	0	64184	(MT)
Exports	0	21225	0	18000	0	26000	(MT)
Dom. Leaf Consumption	0	11800	0	12000	0	14500	(MT)
U.S. Leaf Dom. Consum.	0	3000	0	1200	0	1000	(MT)
Other Foreign Consump.	0	900	0	150	0	100	(MT)
TOTAL Dom. Consumpti	0	15700	0	13350	0	15600	(MT)
TOTAL Disappearance	0	36925	0	31350	0	41600	(MT)
Ending Stocks	0	14784	0	23734	0	22584	(MT)
TOTAL DISTRIBUTION	0	51709	0	55084	0	64184	(MT)

PS&D Table, Tobacco, Unmfg., Burley

PSD Table

Country	Greece						UOM
	Tobacco, Unmfg., Burley (HA)(MT)						
Commodity	2002	Revised	2003	Estimate	2004	Forecast	MM/YYYY
	USDA Official [	Estimate [	DA Official [	Estimate [	DA Official [	Estimate [New]	
Market Year Begin	01/2002		01/2003		01/2004		
Area Planted	0	2956	0	2950	0	4144	(HA)
Beginning Stocks	0	4055	0	3594	0	4144	(MT)
Farm Sales Weight Prod	0	12500	0	13000	0	13600	(MT)
Dry Weight Production	0	11942	0	12200	0	12500	(MT)
U.S. Leaf Imports	0	1200	0	800	0	900	(MT)
Other Foreign Imports	0	1786	0	1000	0	1300	(MT)
TOTAL Imports	0	2986	0	1800	0	2200	(MT)
TOTAL SUPPLY	0	18983	0	17594	0	18844	(MT)
Exports	0	6103	0	5000	0	6200	(MT)
Dom. Leaf Consumption	0	6486	0	6600	0	6800	(MT)
U.S. Leaf Dom. Consum.	0	1100	0	850	0	850	(MT)
Other Foreign Consump.	0	1700	0	1000	0	1200	(MT)
TOTAL Dom. Consumpti	0	9286	0	8450	0	8850	(MT)
TOTAL Disappearance	0	15389	0	13450	0	15050	(MT)
Ending Stocks	0	3594	0	4144	0	3794	(MT)
TOTAL DISTRIBUTION	0	18983	0	17594	0	18844	(MT)

PS&D Table, Tobacco, Unmfg., Oriental

PSD Table

Country	Greece						UOM
	Tobacco, Unmfg., Oriental (HA)(MT)						
Commodity	2002	Revised	2003	Estimate	2004	Forecast	MM/YYYY
	USDA Official	Estimate [D]	DA Official	Estimate [D]	DA Official	Estimate [New]	
Market Year Begin	01/2002		01/2003		01/2004		
Area Planted	0	42000	0	39000	0	40000	(HA)
Beginning Stocks	0	12384	0	17996	0	24335	(MT)
Farm Sales Weight Prod	0	70219	0	68000	0	65000	(MT)
Dry Weight Production	0	69058	0	67000	0	64000	(MT)
U.S. Leaf Imports	0	0	0	0	0	0	(MT)
Other Foreign Imports	0	17850	0	15062	0	14000	(MT)
TOTAL Imports	0	17850	0	15062	0	14000	(MT)
TOTAL SUPPLY	0	99292	0	100058	0	102335	(MT)
Exports	0	56796	0	47923	0	53000	(MT)
Dom. Leaf Consumption	0	22700	0	25000	0	25000	(MT)
U.S. Leaf Dom. Consum.	0	0	0	0	0	0	(MT)
Other Foreign Consump.	0	1800	0	2800	0	4000	(MT)
TOTAL Dom. Consumpti	0	24500	0	27800	0	29000	(MT)
TOTAL Disappearance	0	81296	0	75723	0	82000	(MT)
Ending Stocks	0	17996	0	24335	0	20335	(MT)
TOTAL DISTRIBUTION	0	99292	0	100058	0	102335	(MT)

PS&D Table, Tobacco, Mfg., Cigarettes

PSD Table

Country	Greece						UOM
	Tobacco, Mfg., Cigarettes (MIL PCS)						
Commodity	2002	Revised	2003	Estimate	2004	Forecast	
	USDA Official [	Estimate [D]	A Official [	Estimate [D]	A Official [	Estimate [New]	
Market Year Begin	01/2002		01/2003		01/2004		MM/YYYY
Filter Production	36100	36100	36100	36100	0	36300	(MIL PCS)
Non-Filter Production	250	320	220	315	0	330	(MIL PCS)
TOTAL Production	36350	36420	36320	36415	0	37500	(MIL PCS)
Imports	12500	13000	12600	13000	0	13100	(MIL PCS)
TOTAL SUPPLY	48850	49420	48920	49415	0	50600	(MIL PCS)
Exports	18000	18420	18200	18015	0	16730	(MIL PCS)
Domestic Consumption	30850	31000	30720	31400	0	33870	(MIL PCS)
TOTAL DISTRIBUTION	48850	49420	48920	49415	0	50600	(MIL PCS)

Export Trade Matrix, Tobacco Unmfg., Total

Export Trade Matrix

Country Greece

Commodity Tobacco, Unmfg., Total

Time Period		Units:	MT
Exports for:	2002		2003
U.S.	6501	U.S.	7679
Others		Others	
Germany	5179	Germany	6661
Belg.and Lux.	2370	Belg.and Lux.	4261
France	3499	France	2495
Italy	2621	Italy	3220
Netherlands	1750	Netherlands	3719
Other EU	3809	Other EU	3953
>EU Total	19228	>EU Total	24309
Russian Fed.	16239	Russian Fed.	6930
Egypt	5061	Japan	2614
Algeria	5410	Korea	5027
Total for Others	45938		38880
Others not Listed	31685		24364
Grand Total	84124		70923

Import Trade Matrix, Tobacco, Unmfg., Total

Import Trade Matrix

Country Greece

Commodity Tobacco, Unmfg., Total

Time Period Units:
 Imports for:
 U.S. U.S.

Others		Others	
Belg. and Lux.	3960	Belg. and Lux.	3348
Italy	3701	Italy	1271
Germany	818	Germany	791
Other EU	551	Other EU	264
>EU Total	9030	>EU Total	5674
Brazil	4310	Brazil	3506
Zimbabwe	2976	Zimbabwe	2381
Malawi	1700	Malawi	1283
China	1119	China	1477

Total for Others 19135 14321
 Others not Listed
 Grand Total 23986 18662

Export Trade Matrix, Tobacco, Mfg., Cigarettes

Export Trade Matrix

Country Greece

Commodity Tobacco, Mfg., Cigarettes

Time Period Units:
 Exports for:
 U.S. U.S.

Others		Others	
Netherlands	19	Netherlands	21
Germany	16	Germany	32
Italy	5	Portugal	26
Belg. and Lux.	2	Spain	10
>EU Total	42	Other EU	3
Albania	1845	>EU Total	92
Mauritania	2835	Mauritania	4303
Niger	2268	Albania	1695
Turkey	1276	Bulgaria	1285
Egypt	912	Egypt	1449
Total for Others	9178		8824
Others not Listed	7524		7102
Grand Total	18565		16131

Import Trade Matrix, Tobacco, Mfg., Cigarettes

Import Trade Matrix

Country Greece

Commodity Tobacco, Mfg., Cigarettes

Time Period Units:
 Imports for:
 U.S. U.S.

Others		Others	
Netherlands	6149	Netherlands	4058
Germany	2720	Germany	6353
U.K.	1982	U.K.	1948
Denmark	951	Denmark	737
Other EU	558	Other EU	977
>EU Total	12360	>EU Total	14073
Dominic. Rep.	12	Dominic. Rep.	14
Mexico	4	Cyprus	2
Czech Repub.	3		

Total for Others 12379 14089
 Others not Listed
 Grand Total 12399 14099